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# **17 key lessons for leaders culled from 22 years in the business**

# Don't become captivated by all the rhetoric around change.

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- Balance the forces of change and stability.
- Cultivate stability. Confirm and retain what is done well now that meets your standards.
- Find ways to celebrate existing accomplishment.
- Acknowledge systems and programs that work.



# When change is needed, start with your own ideas

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- You are the key strategist for your organization.
- Your rich and complex experience should brings you “senses” of direction.
- You develop vehicles and processes for articulating and refining these, involving others as appropriate.
- Remember: Hard data, analyses, external needs assessments will probably not tell you what to do or be.

# The real art form is knowing when and how to involve others

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Acceptance of major decisions and directions is vitally affected by three factors:

1. You provide creative mechanisms for others to give input. (staff, board, volunteers)
2. You are clear to these people how their input will be considered. (Who will consider it? When? How?)
3. You create system-wide communication vehicles to explain all final decisions and final directions and how input affected the outcome.

# There is, however, an important place for teams or committees doing the work

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- Under the right conditions, the judgments delivered via good group processes can substantially enhance a) the commitment of those around you and b) the quality of the decisions themselves.
- You create participation for two reasons:
  1. You believe that participation will serve the mission via the judgments and intellectual resources delivered by the participants.
  2. You politically have to involve certain people and constituencies.

# Continually work to make people around you focus on the future

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- Keep everyone oriented towards the short list of crucial outcomes that are the key to success and service.
- In any year, manage and govern around the key three to five important items.
- Avoid long lists of new initiatives and activities. You'll never get to them all.

If you need to plan or make decisions using a committee, define the rules and fairness of the process before you begin.

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- Define the committee's authority. Is it charged to bring back a range of options? A single proposal? A preferred alternative within several options?
- Agree on committee representation.
- Create due dates and time limits.
- Be clear on the nature of staff support and how much actual deliberative time is available.
- Agree on the decision process that will be used.

# Avoid a common tendency to under-estimate the resources needed for new initiatives - especially those that involve committees

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- What kind of deliberative time is actually available?
- Who will really have the time to serve on the committee?
- How will the committee be administratively supported?
- Where does this effort sit in relation to other current vital work?

# Recognize that consensus can be a weak decision-making method

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- Consensus usually requires unanimity.
- If everyone is in agreement the change is probably not meaningful.
- Healthy disagreement makes for stronger organizations
- Use decision rules and polling techniques that allow for minority opinions.
- Teach your board to use simple legislative procedures that allow richer decision-making than a consensus model.

# Recognize that the commitment of individual board members is largely contingent on the investment you make in cultivating relationships

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- Know your board members well.
  - Make the calls to set up the lunches and coffees.
  - Find out who these people are and how they approach the world.
  - Help them to create a vehicle for service within your organization.
- Give real attention on board recruitment processes. Stay vitally involved even if you have a strong board recruitment committee.

# Be careful about cutting deals to get people on your board

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- Too much of a “customer orientation” on your part will lead to newly arriving board members with special agreements regarding what they will do and will not do.
- Creating private deals can ruin cohesiveness and create bad feelings among board members.
- Creating private deals also creates endless negotiations regarding dates for meetings, conditions for participation, etc.
- Have basic requirements and be tough and consistent in sticking with them. You’ll be surprised at how much better participation you get.

# Cultivate appropriate expectations for what your board will and won't do

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- Even with good systems of accountability and role clarity, you'll still need to bear the inevitable frustration as some board members don't comply with the basic board job description. That's the way it will always be.
- See the different types and levels of commitment as a natural condition within the typical board.
- Don't expect that the day will ever come in which all your board members will be deeply committed to your organization. It will never happen.
- Your board is parade. Members are arriving, moving through, and leaving.

# Know that your board will struggle over its role

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- Most boards are unsure of their appropriate policy role.
- There are no simple rules that easily establish what kind of issues they should be involved in or not be involved in.
- Important emerging issues are almost always special cases, and will require dialogue and negotiation regarding the optimal board role.

# Stay on top of your budget every single day of the year

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- On going budget problems always mean two things
  - The board will get much more involved.
  - The board will begin to lose trust in your management capabilities.
- Do everything possible to not allow your organization to over-extend itself.
- Don't run your budget and general programs at a breaking point.
- Operating in the black is more important than serving more people.

# Cultivate a bias for enthusiastic action and commitment

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- Board and staff who perpetually sit back with their arms folded being analytical and waiting for proof that an initiative is the right one can derail progress.
- Important strategies and new directions take on meaning as people infuse them with energy and get excited.



# Don't assume you really know what the staff and board members around you think

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- “Work to build a culture that insures that people are not protecting themselves and each other by withholding important information, suppressing feelings, and offering false sympathy.” (Chris Argyris, 2001)
- You watch yourself (and others) to make sure there are not major distinctions between what you say and what you actually do.

# Evaluate what happens with all important agreements

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- To create real organizational learning and change, the toughest and most important work of all is the evaluation of implementation.
  - Implementation is 95% if the work.
  - Create clear feedback points - dates and methods - to allow for assessing deviation between what was originally intended and what actually has happened.
  - Don't bury and conceal implementation problems as they occur.

# How does change happen?

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- Learning is not possible without acting. Organizations act first, find out what works, make sense of it in retrospect, and then retain the behaviors that seem desirable.
- While this sounds logical enough, it reverses the idea that strategies should be thoroughly thought through before being implemented.
- The role of leadership becomes not to pre-conceive deliberate strategies, but to manage the process of strategic learning. (Henry Mintzberg, 1994, The fall of Strategic Planning)